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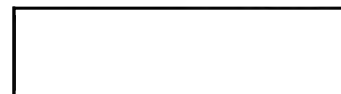
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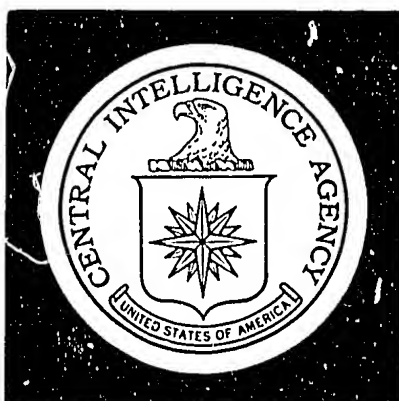
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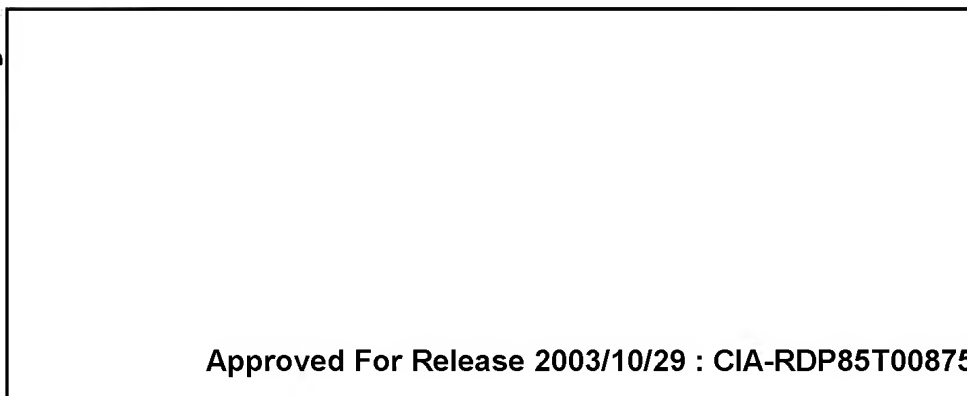
DIRECTORATE OF
INTELLIGENCE

Intelligence Memorandum

Shipping To North Vietnam During December 1970

ONI review(s) completed.

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ER IM 71-13
January 1971

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Foreword

All data in this memorandum are preliminary and subject to minor changes as additional information becomes available. Data for the preceding month and monthly averages presented in the tables have been adjusted to reflect corrections and additions. Weights of cargoes are expressed in metric tons. Because of rounding, components may not add to the totals shown. A memorandum on shipping to North Vietnam during the year 1970 will be published separately.

During 1971, *Shipping to North Vietnam* will be published quarterly rather than monthly. Both arrival and cargo information, however, will be compiled monthly and will be provided by

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CENTRAL INTELLIGENCE AGENCY
Directorate of Intelligence
January 1971

INTELLIGENCE MEMORANDUM

Shipping To North Vietnam
During December 1970

Highlights

After four consecutive monthly increases, North Vietnam's seaborne trade declined by 26% in December, to 201,000 tons. Imports dropped to 138,000 tons, more than 20,000 tons below the monthly average during January-November, and deliveries from the USSR fell to 108,000 tons, only 70% of their record volume in November. Foodstuff imports were halved, and deliveries of both fertilizer and general and miscellaneous cargo dropped by approximately 25%. Petroleum deliveries, however, remained one-third higher than the January-November monthly average. As in preceding months, deliveries included a small tonnage of otherwise unidentified Soviet military aid cargo. Imports from the Free World (all from Hong Kong) fell to only 400 tons, the lowest volume since April 1968.

Exports declined to 64,000 tons but were still well above the average level during January-November. Coal exports fell by more than 25%, largely as a result of the absence of shipments to China. Apatite exports rose slightly, and cement exports reached their highest level since January. As in November, there were no rice shipments.

Ship arrivals dropped from 48 in November to 36 in December, and there was no congestion in Haiphong after the third day of the month. The average number of foreign dry cargo ships in port

Note: This memorandum was prepared by the Office of Economic Research and information on ship arrivals was coordinated with the Naval Intelligence Command.

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per day in December fell to nine, the lowest since February 1967. Construction continued on Haiphong's Chamber of Commerce Wharves, and it now appears that more cranes will be erected. Three Chinese ships, sailing from China, delivered unidentified cargoes to the Vinh area, and three Soviet tankers lightered at Haiphong into North Vietnamese tankers for further shipment to the Vinh area.

Imports

1. North Vietnamese seaborne imports dropped to 138,000 tons in December, nearly 60,000 tons less than the high volume in November (see Tables 1 and 2). Most of the decrease occurred in foodstuffs, which fell 53% to 37,100 tons. Imports of foodstuffs from the USSR, primarily wheat, dropped to 36,600 tons, well below the near-record 54,300 tons in November. There were probably some additional food deliveries, however, among the large volume of unidentified cargo from China. Inbound fertilizer declined to 14,000 tons -- all ammonium sulfate from the USSR. There were no fertilizer deliveries from Japan for the first time since June. Petroleum deliveries increased slightly to 39,900 tons, almost 8,000 tons more than the amount requested for delivery during December, but close to the amounts requested for January (41,000 tons) and February (40,000 tons).

2. Imports of general and miscellaneous cargo fell to 46,400 tons, almost 10,000 tons below the average for January-November. This is largely attributable to a drop in deliveries from the USSR from the record 45,200 tons in November to 17,400 tons, the second lowest monthly volume in 1970. There were only four arrivals of large Soviet freighters (which usually carry substantial amounts of general cargo), down from seven in November.* Two Soviet ships from the Black Sea delivered

* *Except for one ship which delivered cement from Vladivostok in November, all of these vessels sailed from Soviet Black Sea ports.*

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4,900 tons of pyrites, probably for sulphuric acid production. Small quantities of drilling equipment, perhaps for petroleum exploration, arrived on Soviet and Polish ships. As they have each month for the past year and a half, deliveries from the USSR included small tonnages of unspecified military aid cargo. Three Soviet ships from the Black Sea delivered about 40 tons of this cargo in December, well below the January-November monthly average of 60 tons. [redacted] evidence on these deliveries suggests that they are military-support items rather than arms or ammunition.

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[redacted] More than half of the cargo from China was shipped to the Vinh area, and at least some of it was probably rice (see paragraph 6). The imports from China accounted for 86% of the unidentified cargo delivered from all origins in December.

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Exports

4. Although seaborne exports declined moderately to 64,000 tons, they were about 17,000 tons higher than the monthly average during January-November (see Tables 3 and 4). The decline in December reflected a 27% reduction in coal exports to 42,300 tons, the result of an interruption in coal shipments to China. Soviet ships carried all of the coal -- 41,200 tons to Japan and the remainder to Hong Kong. Shipments to Japan were only 3,200 tons below the November high. Apatite shipments, which rose to 9,600 tons, included 4,600 tons for China and the second major consignment for Japan in 1970 (4,000 tons). Cement shipments reached 3,100 tons, their highest level since January.

Activity at North Vietnamese Ports

5. Ship arrivals at North Vietnamese ports during December dropped to 36, down from the 48 that arrived in November (see Table 5). After 3 December, there was no congestion in Haiphong. The average number of ships in port per day

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declined from 16 in November to nine in December, the lowest number since February 1967 (see the chart). The average layover time for departing dry cargo ships (which reflects congestion during the previous month) was 16 days, one less than in November. Construction continued on the extension of Haiphong's Chamber of Commerce Wharves. A Soviet ship delivered portal cranes and parts during December, suggesting that additional cranes will be installed on the wharf extension to supplement the four already in place.

6. Three Chinese ships, an unusually high number, called at the Hon Nieu Anchorage near Vinh during the month and offloaded 11,500 tons of cargo from China, none of it identified. In the past, drummed petroleum and rice have been offloaded from Chinese ships at this area. In addition, cargoes from three Soviet tankers that arrived in Haiphong during December were lightered by North Vietnamese tankers to the Vinh area (and to Quang Khe, another small coastal port). Both international and coastal shipping traffic to the Vinh area increased during the second half of 1970.

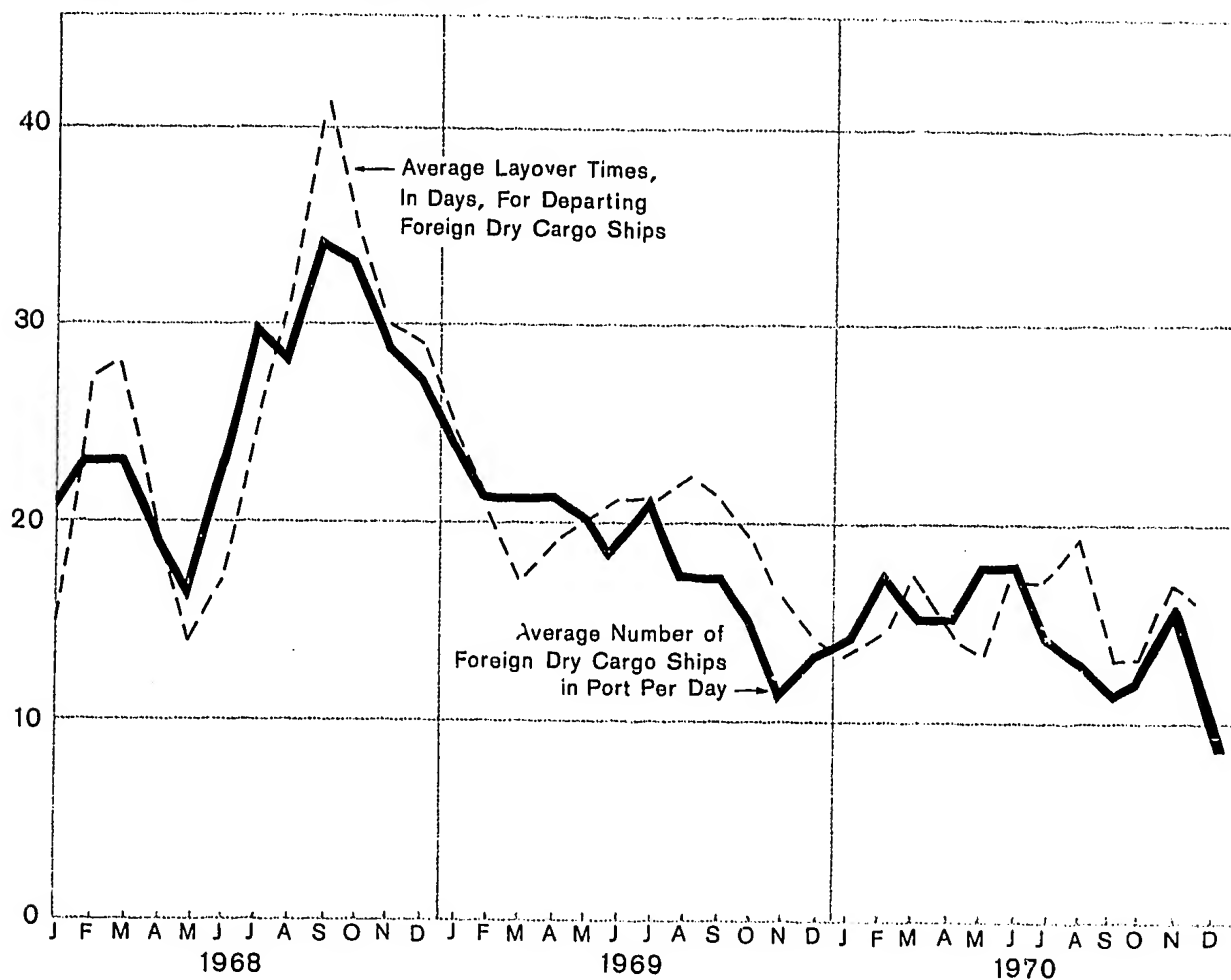
New Shipping Service

7. Negotiations initiated in October between Vietfracht (Vietnamese Foreign Trade Transportation Company) and the East German steamship company Deutsche Seereederei have led to an agreement whereby an East German cargo liner will deliver about 3,000 tons of cargo to Haiphong from Rostock each quarter. The East German freighter *Edgar Andre*, which is en route to North Vietnam with an estimated arrival in January, is making the first voyage under this agreement. The East German company has been operating a liner service to three Southeast Asian ports, and Haiphong apparently will be an occasional fourth port on this service.

8. Most East German aid cargoes have been delivered by Polish and Chinese vessels in recent years. However, in 1969, the first year in which East German ships called at North Vietnam, eight

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Congestion at Haiphong*



*Tankers are excluded from these averages because they do not compete with dry cargo ships for the limited berthing space in Haiphong. The average layover time for departing dry cargo ships is compiled by averaging layover times (including both the day of arrival and the day of departure) of all foreign dry cargo ships leaving Haiphong in the month.

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of them transported nearly 40% of this cargo as indicated in the tabulation below. Only one East German ship called at Haiphong in 1970.

| | <u>Metric Tons</u> | | |
|--------------------------------|--------------------|-------------|-------------|
| | <u>1968</u> | <u>1969</u> | <u>1970</u> |
| <i>Total</i> | 20,900 | 43,200 | 36,400 |
| On Polish and Chinese ships | 20,900 | 27,100 | 33,700 |
| On East German ships | -- | 16,100 | 2,700 |

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Table 1

Seaborne Imports, by Origin and Commodity a/
1970

Thousand Metric Tons

| Origin | Foodstuffs | | Fertilizer | | Petroleum | | General and Miscellaneous | | Total | |
|----------------|------------|-------------------------------|------------|-------------------------------|-----------|-------------------------------|------------------------------|-------------------------------|-------|-------------------------------|
| | Dec | Monthly Average Jan-Nov | Dec | Monthly Average Jan-Nov | Dec | Monthly Average Jan-Nov | Dec | Monthly Average Jan-Nov | Dec | Monthly Average Jan-Nov |
| <i>Total</i> | 37.1 | 56.6 | 14.0 | 17.0 | 39.9 | 29.3 | 46.4 | 55.6 | 137.5 | 158.5 |
| Communist | 36.8 | 56.5 | 14.0 | 13.3 | 39.9 | 29.3 | 46.3 | 53.5 | 137.1 | 152.6 |
| USSR | 36.6 | 37.3 | 14.0 | 11.1 | 39.9 | 28.7 | 17.4 | 26.4 | 108.0 | 103.5 |
| Eastern Europe | 0.2 | 0.8 | -- | 1.1 | -- | Negl. | 7.1 | 10.8 | 7.3 | 12.7 |
| China | -- | 13.5 | -- | -- | -- | 0.5 | 21.8 | 15.4 | 21.8 | 29.4 |
| North Korea | -- | 0.4 | -- | 1.1 | -- | -- | -- | 0.9 | -- | 2.3 |
| Cuba | -- | 4.6 | -- | -- | -- | -- | -- | Negl. | -- | 4.6 |
| Free World | 0.3 | 0.1 | 0 | 3.7 | 0 | 0 | 0.1 | 2.1 | 0.4 | 5.9 |
| Japan | -- | -- | -- | 3.7 | -- | -- | -- | 0.2 | -- | 4.0 |
| Cambodia | -- | Negl. | -- | -- | -- | -- | -- | 1.2 | -- | 1.3 |
| Other | 0.3 | 0.1 | -- | -- | -- | -- | 0.1 | 0.6 | 0.4 | 0.7 |

a. Identified imports include some estimates of bulk cargoes using methods which have proved to be highly reliable.

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Table 2
Seaborne Imports, by Flag and Commodity
1970

| Flag | Thousand Metric Tons | | | | | Nov | Monthly Average Jan-Nov |
|------------------|----------------------|-----------------|----------------|--------------------------------------|--------------|--------------|-------------------------------|
| | Dec | | | | Total | | |
| | Food- stuffs | Ferti- lizer | Petro- leum | General and Miscel- laneous | | | |
| <i>Total</i> | <i>37.1</i> | <i>14.0</i> | <i>39.9</i> | <i>46.4</i> | <i>137.5</i> | <i>137.2</i> | <i>158.5</i> |
| Communist | <u>37.1</u> | <u>14.0</u> | <u>39.9</u> | <u>38.4</u> | <u>129.5</u> | <u>185.0</u> | <u>137.6</u> |
| Soviet | 36.6 | 14.0 | 39.9 | 17.4 | 108.0 | 151.5 | 106.4 |
| East European | 0.2 | -- | -- | 7.1 | 7.3 | 6.0 | 12.4 |
| Chinese | -- | -- | -- | 13.8 | 13.8 | 17.1 | 13.9 |
| Cuban | -- | -- | -- | -- | -- | 10.3 | 4.6 |
| North Vietnamese | 0.3 | -- | -- | 0.1 | 0.4 | 0.1 | 0.3 |
| Free World | <u>0</u> | <u>0</u> | <u>0</u> | <u>8.0</u> | <u>8.0</u> | <u>12.3</u> | <u>20.9</u> |

Table 3

Seaborne Exports, by Destination and Commodity a/
1970

Thousand Metric Tons

| Destination | Coal | | Cement | | Apatite | | Rice | | General and Miscellaneous | | Total | |
|----------------|-------------|-------------------------------|------------|-------------------------------|------------|-------------------------------|----------|-------------------------------|------------------------------|-------------------------------|-------------|-------------------------------|
| | Dec | Monthly Average Jan-Nov | Dec | Monthly Average Jan-Nov | Dec | Monthly Average Jan-Nov | Dec | Monthly Average Jan-Nov | Dec | Monthly Average Jan-Nov | Dec | Monthly Average Jan-Nov |
| <i>Total</i> | <i>42.3</i> | <i>29.6</i> | <i>3.1</i> | <i>1.1</i> | <i>9.6</i> | <i>7.5</i> | <i>0</i> | <i>2.0</i> | <i>8.5</i> | <i>6.3</i> | <i>63.5</i> | <i>46.4</i> |
| Communist | <u>0</u> | <u>10.4</u> | <u>0</u> | <u>0</u> | <u>4.6</u> | <u>6.9</u> | <u>0</u> | <u>0</u> | <u>3.6</u> | <u>3.1</u> | <u>8.2</u> | <u>20.3</u> |
| USSR | -- | -- | -- | -- | -- | -- | -- | -- | -- | 0.4 | -- | 0.4 |
| Eastern Europe | -- | 0.6 | -- | -- | -- | -- | -- | -- | 1.5 | 0.9 | 1.5 | 1.4 |
| China | -- | 8.9 | -- | -- | 4.6 | 3.0 | -- | -- | 2.1 | 1.7 | 6.7 | 13.6 |
| North Korea | -- | -- | -- | -- | -- | 3.8 | -- | -- | -- | 0.1 | -- | 3.9 |
| Cuba | -- | 0.9 | -- | -- | -- | -- | -- | -- | -- | 0.1 | -- | 1.0 |
| Free World | <u>42.3</u> | <u>19.2</u> | <u>3.1</u> | <u>1.1</u> | <u>5.0</u> | <u>0.6</u> | <u>0</u> | <u>2.0</u> | <u>4.9</u> | <u>3.2</u> | <u>55.3</u> | <u>26.1</u> |
| Japan | 41.2 | 17.8 | -- | -- | 4.0 | 0.4 | -- | -- | 0.8 | 0.3 | 45.9 | 18.5 |
| Cambodia | -- | -- | -- | -- | -- | -- | -- | -- | -- | 0.2 | -- | 0.2 |
| Other | 1.2 | 1.4 | 3.1 | 1.1 | 1.0 | 0.2 | -- | 2.0 | 4.1 | 2.7 | 9.4 | 7.4 |

a. Identified exports include some estimates of bulk cargoes using methods which have proved to be highly reliable.

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Table 4
Seaborne Exports, by Flag and Commodity
1970

| | | | | | | | Thousand Metric Tons | |
|------------------|-------------|------------|------------|----------|--------------------------------------|-------------|----------------------|-------------------------------|
| | | | | | | | Dec | |
| Flag | Coal | Cement | Apatite | Rice | General and Miscel- laneous | Total | Nov | Monthly Average Jan-Nov |
| <i>Total</i> | <i>42.3</i> | <i>3.1</i> | <i>9.6</i> | <i>0</i> | <i>8.5</i> | <i>63.5</i> | <i>75.6</i> | <i>46.4</i> |
| Communist | <u>42.3</u> | <u>3.1</u> | <u>9.6</u> | <u>0</u> | <u>7.6</u> | <u>62.6</u> | <u>66.1</u> | <u>42.8</u> |
| Soviet | 42.3 | -- | 5.0 | -- | 1.5 | 48.8 | 41.5 | 21.0 |
| East European | -- | -- | -- | -- | 1.4 | 1.4 | 2.8 | 3.4 |
| Chinese | -- | -- | 4.6 | -- | 2.2 | 6.8 | 15.8 | 13.7 |
| Cuban | -- | -- | -- | -- | -- | -- | -- | 1.9 |
| North Vietnamese | -- | 3.1 | -- | -- | 2.4 | 5.5 | 6.0 | 2.8 |
| Free World | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0.9</u> | <u>0.9</u> | <u>9.5</u> | <u>3.5</u> |

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Table 5
Ship Arrivals, by Type, Flag, and Origin
1970

| | Dec | | | | | | | |
|------------------|-----------|----------|-----------------|-----------------|------------|-------|-----------|-------------------------|
| | Origins | | | | | | | |
| | USSR | | | | | | | |
| Type/Flag | Black Sea | Far East | Communist China | Other Communist | Free World | Total | Nov Total | Monthly Average Jan-Nov |
| Total | 5 | 13 | 8 | 2 | 8 | 36 | 48 | 40.8 |
| Dry cargo | 4 | 8 | 8 | 2 | 8 | 30 | 42 | 35.9 |
| Tanker | 1 | 5 | -- | -- | -- | 6 | 6 | 4.8 |
| Communist | 5 | 13 | 6 | 2 | 8 | 34 | 45 | 35.7 |
| Soviet | 5 | 13 | -- | -- | 2 | 20 | 30 | 22.9 |
| East European | -- | -- | -- | 2 | -- | 2 | 1 | 2.4 |
| Bulgarian | -- | -- | -- | 1 | -- | 1 | -- | 0.4 |
| East German | -- | -- | -- | -- | -- | -- | -- | 0.1 |
| Polish | -- | -- | -- | 1 | -- | 1 | 1 | 1.9 |
| Chinese | -- | -- | 6 | -- | -- | 6 | 6 | 5.5 |
| Cuban | -- | -- | -- | -- | -- | -- | 1 | 0.7 |
| North Vietnamese | -- | -- | -- | -- | 6 | 6 | 7 | 4.3 |
| Free World | 0 | 0 | 2 | 0 | 0 | 2 | 3 | 5.1 |
| British | -- | -- | 1 | -- | -- | 1 | 2 | 3.5 |
| Somalian | -- | -- | 1 | -- | -- | 1 | 1 | 1.3 |
| Other | -- | -- | -- | -- | -- | -- | -- | 0.3 a/ |

a. Including one each under the Cypriot, Maltese, and Singaporean flags.

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